Electronic Subcontracting Reporting System (ESRS)
Administrators Guide 1.2

Table of Contents

■ s y m p l i c i t y

Quick Reference:

The two most commonly performed actions on the ESRS system are:

1. Log-In to ESRS

1.1 Existing Users
   I.   Point your browser to https://www.esrs.gov/government/
   II. Login to ESRS by typing your e-mail address and password.
   III. Click "Go"

Government Users Login Screen

1.2 New Users
   I.   Point your browser to https://www.esrs.gov/government/
   II.   Click on the "Register" tab.
   III. Select your Agency.
   IV.   Complete the forms, clicking continue after you have completed each section.
   V.   On the last step, please review the information and click "Submit Registration"
   VI.   You will receive an e-mail after registering. Please follow the directions in the e-mail that you receive.
   VII. After confirming your account, you will see an "Account Confirmation Successful" message. You must now wait for approval by a government official.
   VIII. Once you have been approved, you will be sent another e-mail.
   IX.   You may now login to the system by following "Section 1.1, p. 4" of this manual.

2. Home

     I.   Login to ESRS.
    II.   You will be directed to your ESRS homepage. (Depending upon the level of your account, the homepage and navigation menu may appear differently)
   III.   On the left hand side of the screen, the navigation menu is shown. This menu is available throughout all pages on the system.
   IV.   "Pending Actions" will display all items in the system (that your account has access to) with the status "pending".
    V.   Announcements are created by administrators. For more information on how to create announcements, please review "Section 3" of this manual.
   VI.   Finally, when you have finished using the system, please click on the "Logout" link on the top of every page.

Government Users Login Screen

3. Announcements

Announcements enable administrators to publish targeted messages to system users. Published announcements will appear in designated user's home page.

I. View a list of announcements by clicking on "Announcements" on the left navigation menu.

II. View and/or edit current Announcements by clicking on the Edit icon 📝 or Review icon 🔍.

III. Create a new announcement by clicking the Add New button.

View Announcement Screen

IV. Label the announcement in the Title field.
V. Type your message in the body.
VI. Select the dates and timeframe that the announcement should be active.
VII. Designate the target audience of the announcement.
VIII. Click on the "Submit" button when you are finished.
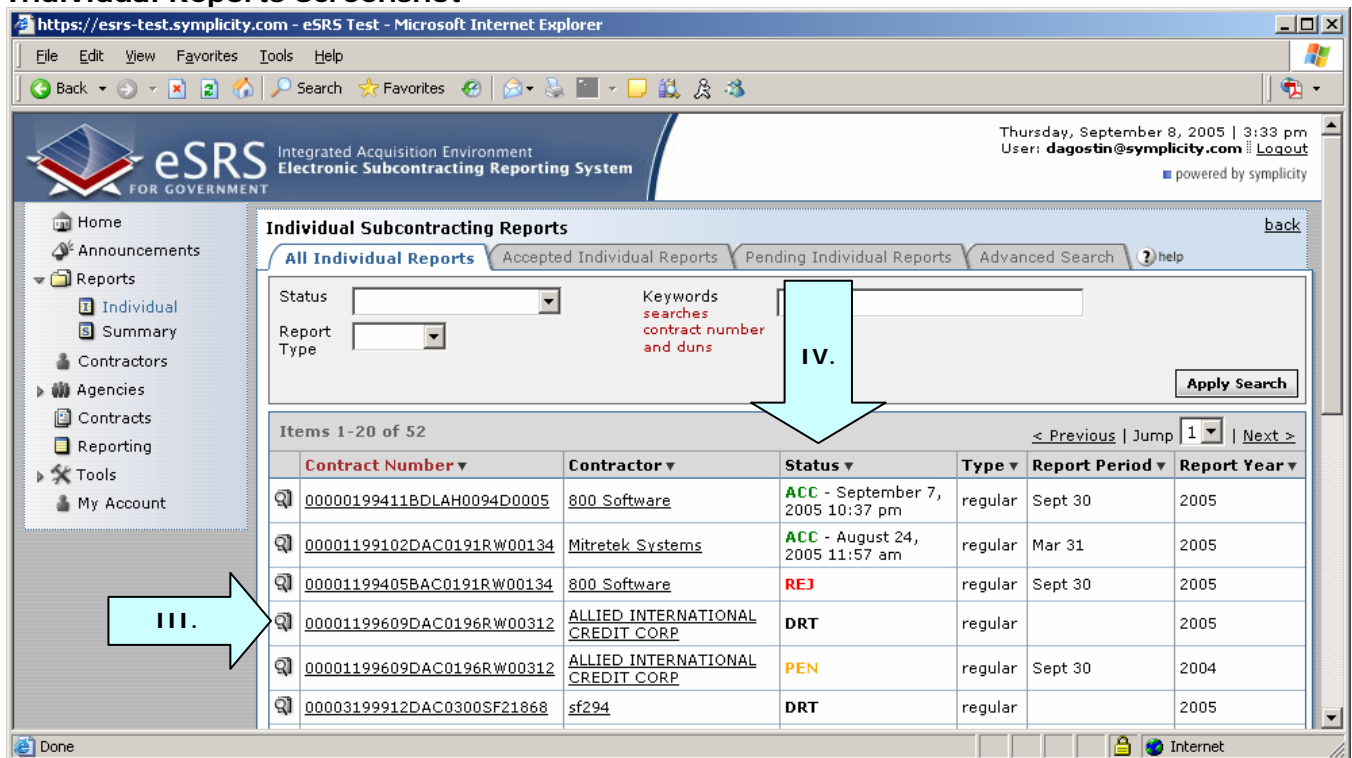
Create Announcement Screen

4. Reports

4.1 Individual

    I.   Click on "Reports" and then "Individual" on the left hand navigation menu.

   II.   You will see a screen similar to the Individual Reports Screenshot below.

  III.   Click on the 🔍 View Icon beside any report to see more information regarding the filed report.

  IV.   You may sort the list of reports based on column. This is accomplished by clicking on the text next to any down arrow (▼) in the column headings. You may sort the list in ascending order if you click on the same heading again. Note how the color of the text changes. The current active column is designated by a **maroon** color.

   V.   You may also view only specific types of reports using the search fields above the list or by clicking on the tabs near the top of the screen.

  VI.   Notice, this screen will only show twenty reports at a time. To view more, simply click on the "Next >" or "< Previous" links to traverse through the list.

Individual Reports Screenshot

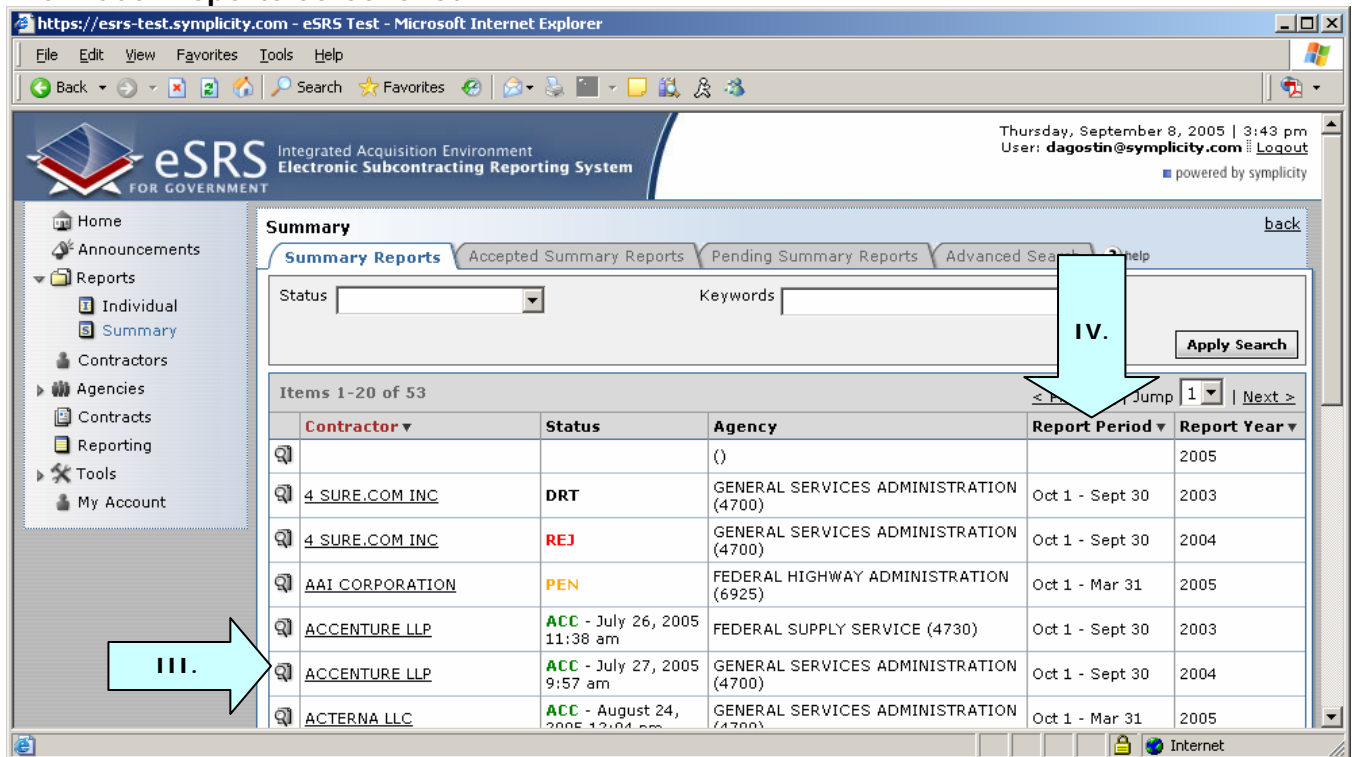**4.2 Summary**

I. Click on "Reports" and then "Summary" on the left hand navigation menu.
II. You will see a screen similar to the "Summary Reports Screenshot" below.
III. Click on the 🖳 View Icon beside any report to see more information regarding the filed report.
IV. You may sort the list of reports based on column. This is accomplished by clicking on the text next to any down arrow (▼) in the column headings. You may sort the list in ascending order if you click on the same heading again. Note how the color of the text changes. The current active column is designated by a Maroon color.
V. You may also view only specific types of reports using the search fields above the list or by clicking on the tabs near the top of the screen.
VI. Notice, this screen will only show twenty reports at a time. To view more, simply click on the "Next >" or "< Previous" links to traverse through the list.

Individual Reports Screenshot

4.3 Accept / Reject

The processes to accept or reject individual and summary reports are the same. To accept or reject, simply go to the section (Individual or Summary) that the report is filed. Click on the "Pending" tab near the top of the screen, and find the report that you would like to accept or reject.

  I.   Click on the ▦ View Icon beside the report.
  II. Select "Accept Report" or "Reject Report" from the drop down box (See "Accept/Reject Screenshot" below).
  III. If you accepted the report, you may return to the report list by clicking on the "Back to Reports List" button.
  IV. If you clicked "Reject Report" you will be redirected to a page with a form. Please fill this form out with information why the report was rejected. After completing the form, click "Submit" to finalize the rejection.
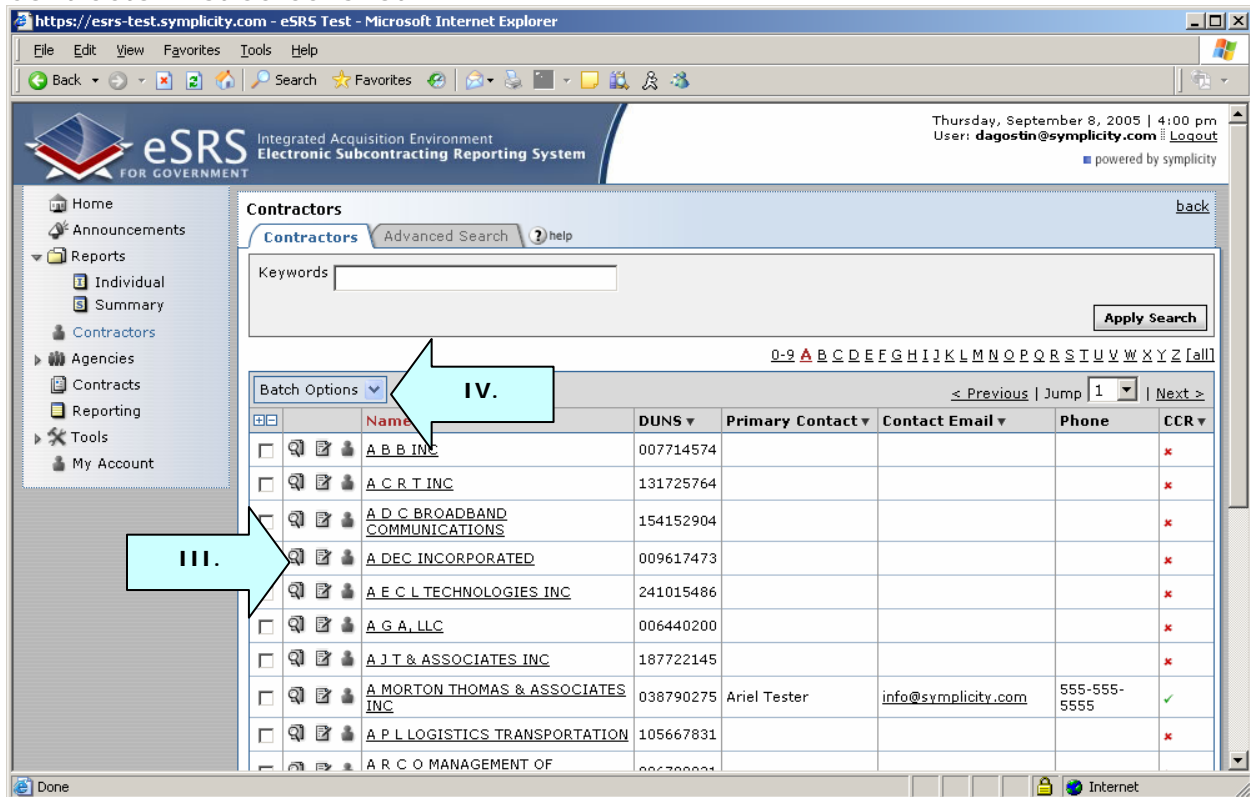
Accept/Reject Screenshot

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5. Contractors

5.1 Review / View Existing

I.   Click on "Contractors" on the left hand navigation menu.
II.   You will see a screen similar to the "Contractor List Screenshot" below.
III. Click on the 🖺 View Icon beside any contractor to see more information regarding the specific contractor.
IV.   You may send a batch e-mail by clicking the check-box beside the contractors you wish to e-mail, and then clicking on the "Batch Options" drop down.

Contractor List Screenshot

5.2 Add New Contractor

    I.   Click on "Contractors" on the left hand navigation menu.
    II.   Click on the "Add New" button near the bottom of the screen.
    III.   You should now see a screen similar to the "Add new Contractor Screenshot" below.
    IV.   Populate the fields.
    V.   Click "Submit" when you are finished.

Add New Contractor Screenshot
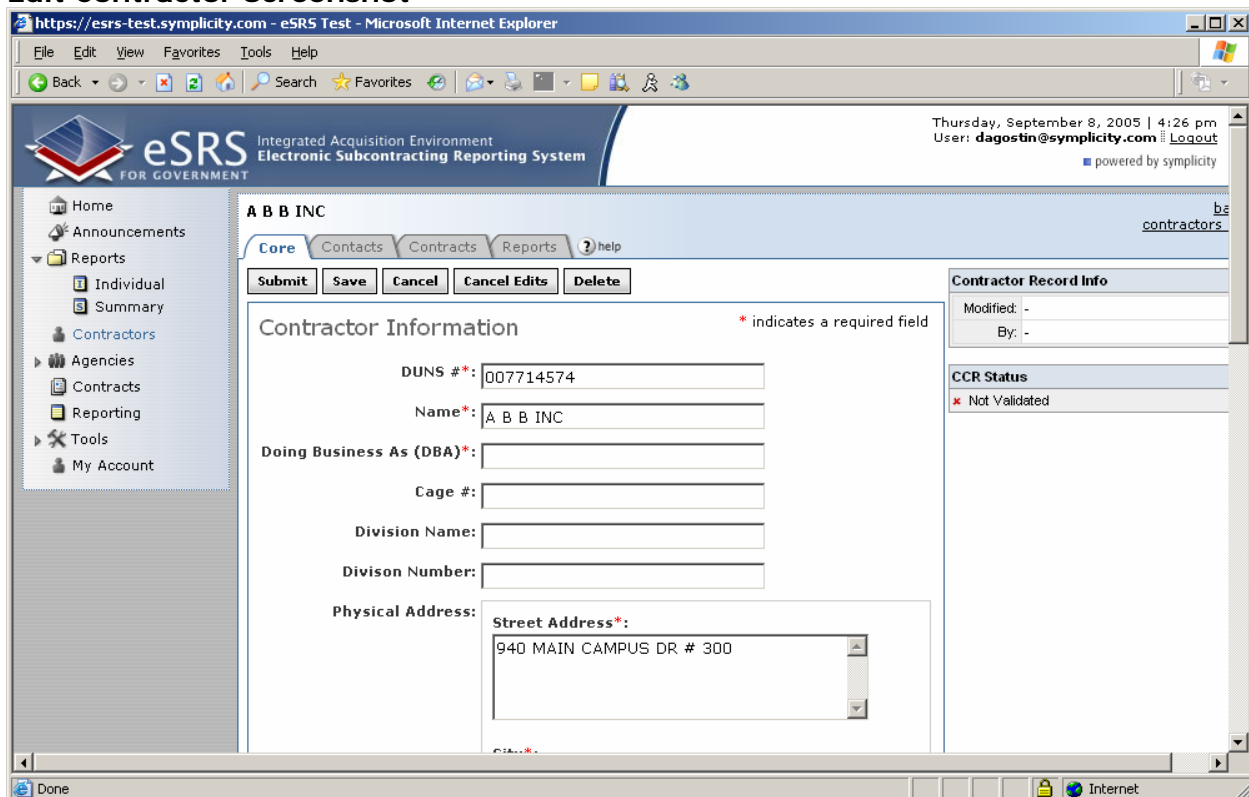
5.3 Edit Contractors

I.   Click on "Contractors" on the left hand navigation menu.
II. Click on the Edit Icon 📝 beside any contractor to edit the contractor.
III. You may also click on the 🔍 View Icon, and then click on the "Edit" button to edit a contractor. (You should see a screen similar to the "Edit Contractor Screenshot" below.)
IV. Edit the fields that you wish to change.
V.   Click "Submit" to save the changes and return back to the contractor list.

Edit Contractor Screenshot

6. Agencies (Organizations)

6.1 Review / View Existing

  I.   Click on "Agencies" on the left hand navigation menu.
 II.   Click on "Organizations" on the left hand menu.
III.   You will see a screen similar to the "Agencies / Organizations Screenshot" below.
 IV.   Click on the ⬚ View Icon beside any contractor to see more information pertaining to that specific contractor.
  V.   Notice that any child organization will appear below the parent organization and will also have a ↳ to the left of the name.

Agencies / Organizations Screenshot

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6.2 Add New Agency

    I.   Click on "Agencies" then "Organizations" on the left hand navigation menu.
   II.   Click on the "Add New" button near the bottom of the screen.
  III.   You should now see a screen similar to the "Add New Contractor Screenshot" below.
  IV.   Populate the fields.
   V.   Click "Submit" when you are finished.

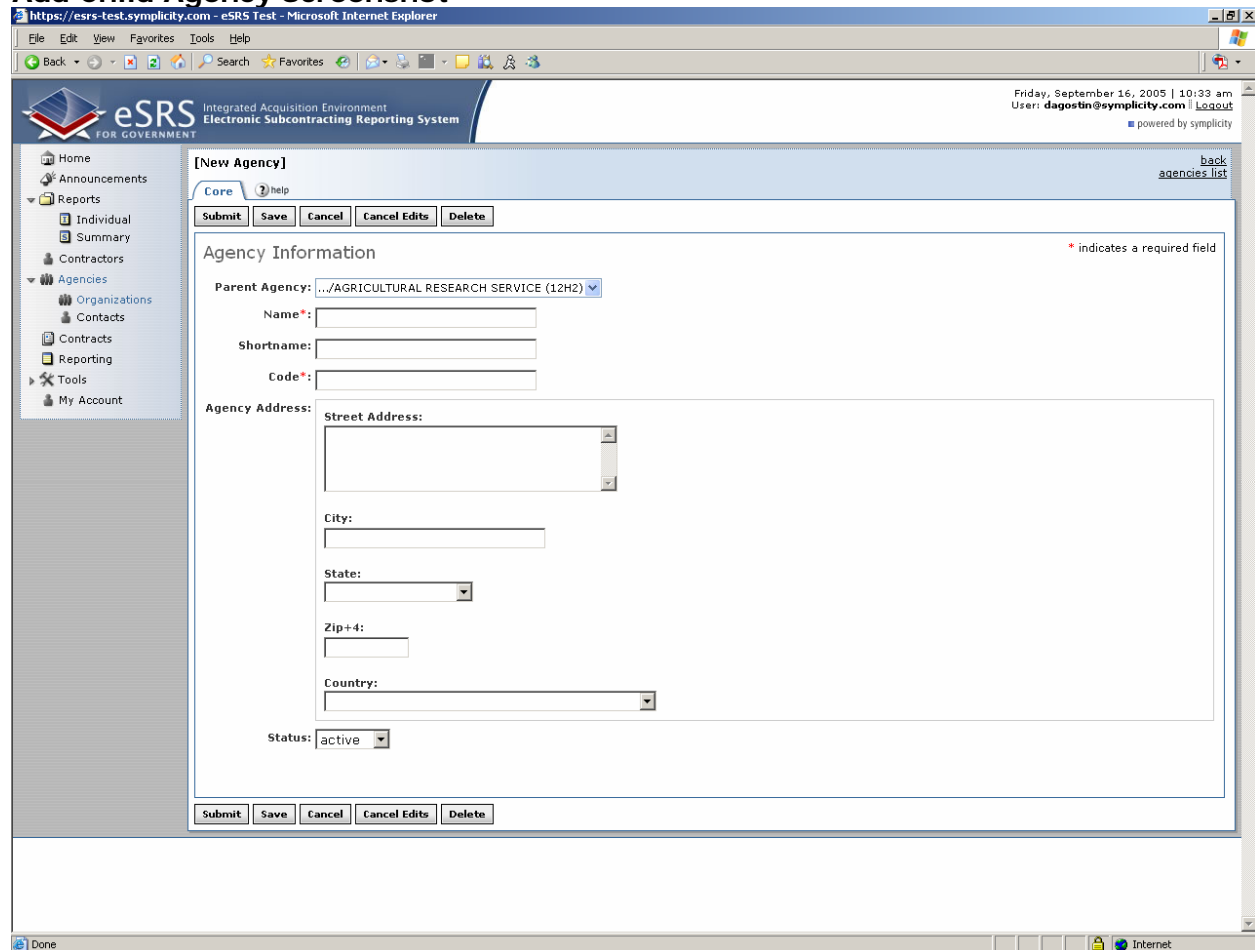**Add New Contractor Screenshot**

6.3 Add New Child Agency

   I.   Click on "Agencies" on the left hand navigation menu.
   II. Click on "Organizations" under Agencies.
   III. Click on the ⬚ Add New Child button next to the parent agency.
   IV. You should now see a screen similar to the "Add Child Agency Screenshot" below.
   V.   Populate the fields.
   VI. Click "Submit" when you are finished.

Add Child Agency Screenshot

6.4 Edit Organization

   I.   Click on "Agencies" on the left hand navigation menu.
   II. Click on "Organizations" under Agencies on the left hand navigation menu.
   III. Click on the Edit Icon 📝 beside any organization to edit.
   IV. Edit the fields that you wish to change.
   V.   Click "Submit" to save the changes and return back to the contractor list.

6.5 Contacts

    I.   Click on "Agencies" on the left hand navigation menu.

   II.   Click on "Organizations" under Agencies.

  III.   Click on the 🔨 Contacts button next to the agency.

  IV.   The Contacts for this agency will appear.

   V.   You can set a contact as the primary contact by clicking on the "Set Primary" button.

  VI.   You may also edit a contact by clicking on the Edit Icon 📝 beside the contact you wish to edit.

 VII.   Finally, to send an e-mail to the contacts, put a checkmark beside the contacts you wish to e-mail. Use the "Batch Options" drop down to send an e-mail.

VIII.   For more information, please read Section 7, Contacts.
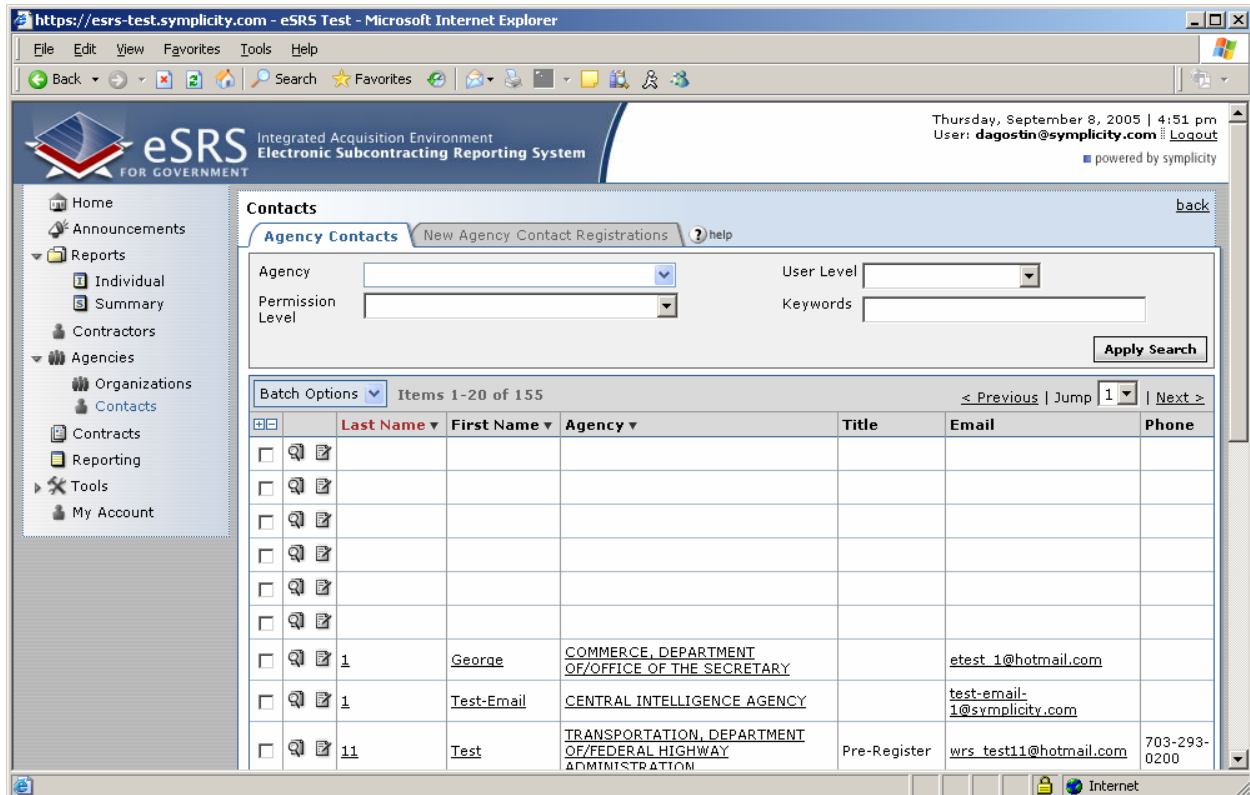
7. Agencies (Contacts)

7.1 Review / View Existing

    I.   Click on "Agencies" on the left hand navigation menu.
   II.   Click on "Contacts" underneath Agencies.
  III.   You will see a screen similar to the "Contacts Screenshot" below.
  IV.   Click on the 🖳 View Icon beside the contact you wish to view.

7.2 Add New Contact

    I.   Click on "Agencies" on the left hand navigation menu.
   II.   Click on "Contacts" underneath Agencies.
  III.   Click the "Add New" button near the bottom of the screen.
  IV.   Select the Agency that the contact should be associated with.
   V.   Populate the form.
  VI.   Click "Submit"
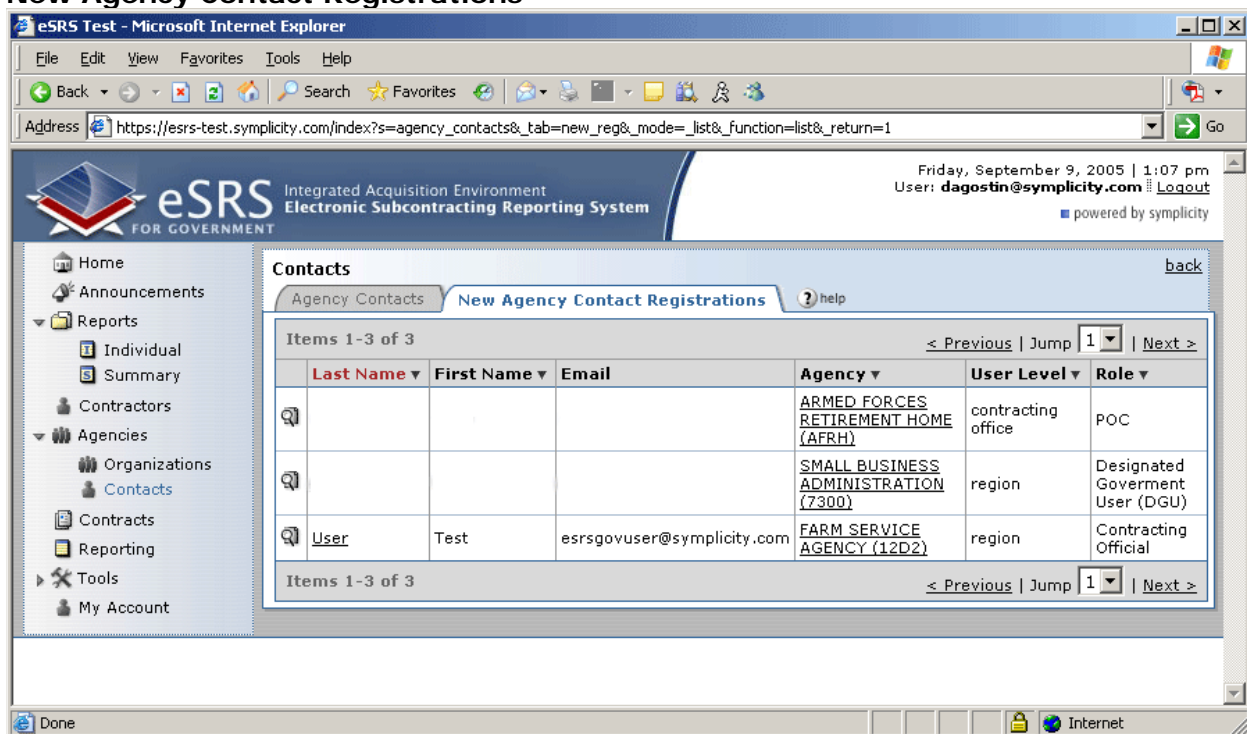
Contacts Screenshot

7.3 Edit Contact

   VI.   Click on "Agencies" on the left hand navigation menu.
  VII.   Click on "Contacts" under Agencies.
VIII.   Click on the Edit Icon 📝 beside the contact you wish to edit.
  IX.   Edit the fields that you wish to change.
   X.   Click "Submit" to save the changes and return back to the contractor list.

7.4 Approve/Reject Agency Contact Registration

Agency Contact registrations must first be approved before the user can begin using the ESRS system.

- I. On the "Home" page, New Contact Registrations will appear under "Pending Actions" if contacts need approved.
- II. Click on the "New Agency Contact Registrations" link.
- III. You may also click on Agencies and then Contacts on the left hand navigation menu. After clicking on Contacts, Click on the "New Agency Contact Registrations" tab to go to the same place that the Home Page link directs you.
- IV. Click on the 🔍 View Icon beside the contact you wish to approve or reject.
- V. Click on **Approve Registration** or **Reject** to complete the process.

New Agency Contact Registrations

8. Contracts

Contracts will be updated nightly from CCR.

8.1 Review / View Existing

    I.   Click on "Contracts" on the left hand navigation menu.

   II.   You will see a screen similar to the "Contracts Screenshot" below.

  III.   Click on the 🔍 View Icon beside the contract you wish to view. You may also click on the contract number.

Contracts Screenshot

8.2 Edit Contract

    I.   Click on "Contracts" on the left hand navigation menu.

   II.   Click on the Edit Icon 📝 beside the contact you wish to edit.

  III.   Edit the fields that you wish to change.

  IV.   Click "Submit" to save the changes and return back to the contractor list.

8.3 Add New Contact

    I.   Click on "Contracts" on the left hand navigation menu.

   II.   Click the "Add New" button near the bottom of the screen.

  III.   Populate the form.

  IV.   Click "Submit"

9. Reporting

9.1 Build New Reports

    I.   Create a new report by clicking on "Reporting" on the left navigation menu.

   II.   Click on the "Add New" button.

Add New Report
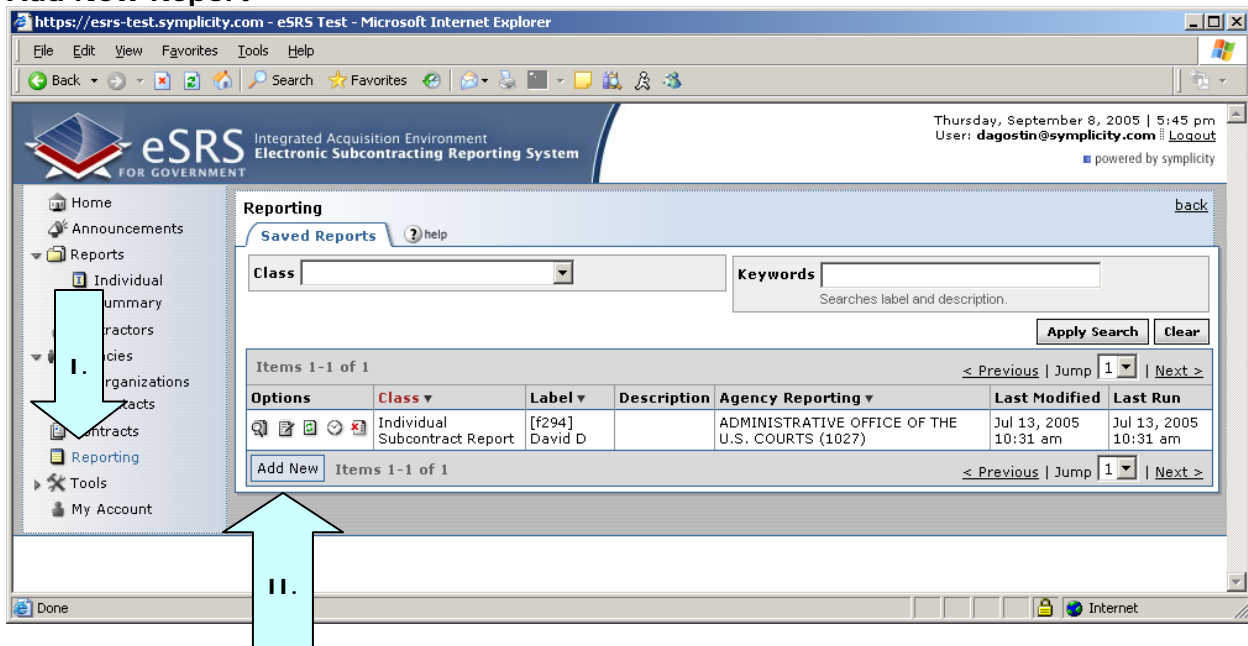
   III.   Select the basis for your report.

   IV.   Click Continue

   V.   Before building the report, checkmark the Save As box and input a Name and Description for the Report.

   VI.   When updating an existing report, save the report under a different name by check-marking Copy to New Report.

   VII.   Select the fields to be included in the report by check-marking specific fields.

  VIII.   Narrow the focus of the report by clicking on a Filter link under a particular field.

   IX.   Once fields and filters have been assigned, view the report by clicking Submit at the bottom of the page. *NOTE:* Save & return will save change to report builder, but will not run report in order to view it.

Build a New Report Screenshot

9.2 View Generated Report

    I.   Click on the ▧ View Icon beside an existing report.

   II.   Show the report in a separate browser by clicking on the "Open in New Window" button near the top of the screen.

  III.   Transfer the report into an Excel Workbook by clicking the Save as Excel button.

  IV.   Re-configure the report by clicking on Change Settings button near the top of the screen.

   V.   Go back to the report list by clicking the "Return to Report List" button.

Review Generated Report

9.3 View Existing Reports

    I.   View Existing Report by clicking on REPORTING on the left navigation menu.

   II.   View Saved Queries/Report on the list.

  III.   View , Edit , Re-run , View Previous Results   by clicking on respective icons.

View Existing Reports

10. Tools

10.1 E-mail Manager

System Emails enable administrators to customize the content of emails that are automatically sent by the system.

I. Review system messages by clicking on the "Email Manager" link on the left hand navigation menu under Tools.

I. Edit the message content (Message Identifier, Subject, etc) by clicking on a message link in the Label column.
    - Personalize the message by utilizing the Default Fields feature to incorporate mail merge fields into the Message Body.

System Message Screen

Picklists enable system administrators to manage ESRS dropdowns. Picklists are pre-packaged dropdown menus that administrators may insert into any form on-the-fly.

10.2 Picklist Repository

    I.   View a list of pre-prepared system picklists by clicking on the Tools section and then clicking the "Picklist Manager" on the left navigation menu.

   II.   Select a picklist category by clicking on a link in the Display Name column.

Picklist List Screen

Edit Picklists

III. Add an item by clicking on a plus sign next to an existing item with a downward pointing arrow.
IV. Remove an object from a picklist by clicking on the X.
V. Change the order of the picklist objects by clicking on the up and down arrows.
VI. Update the name of an item by clicking on the title and entering a new name.
VII. When complete, click Save or Submit at the bottom of the screen.
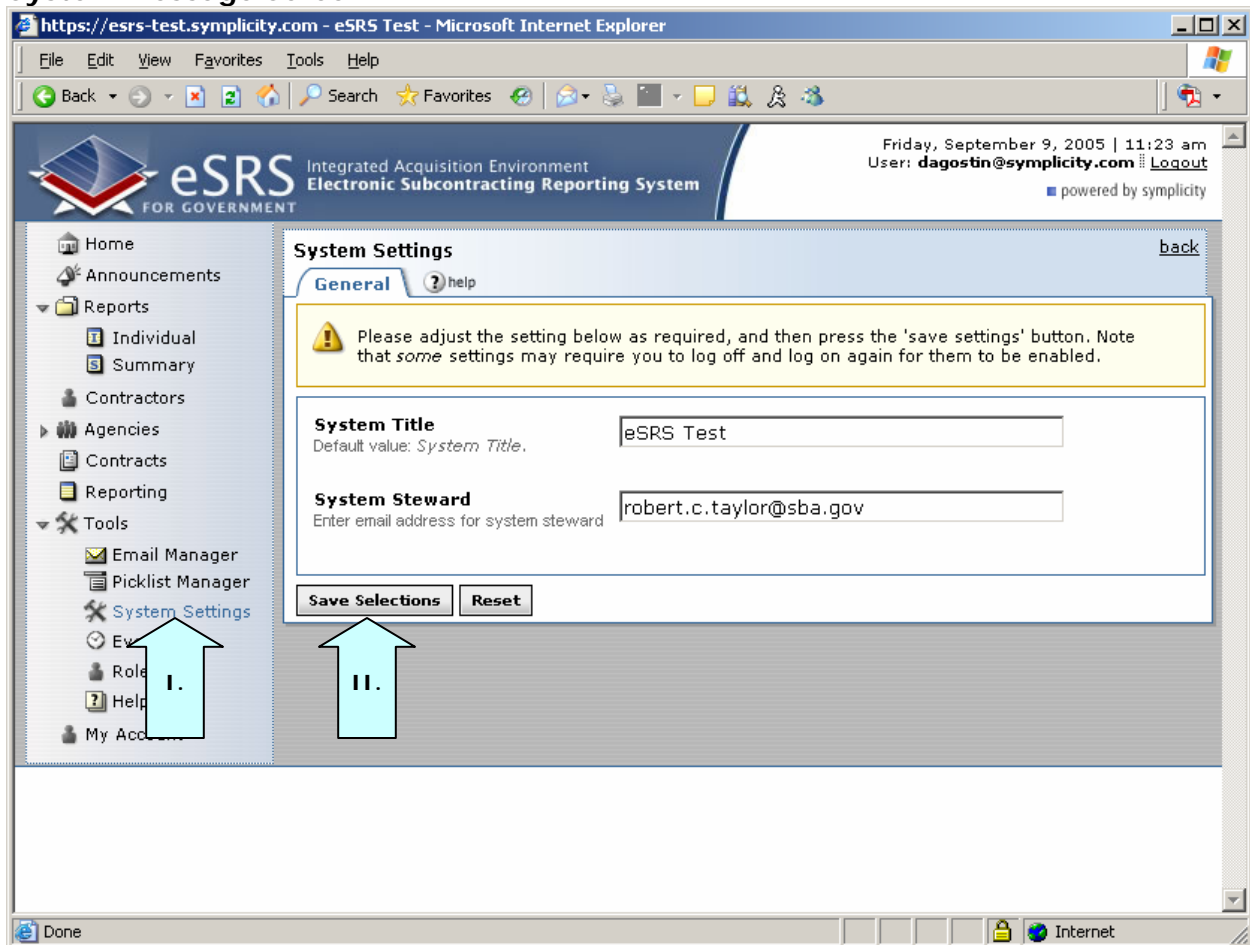
Picklist Edit Screen
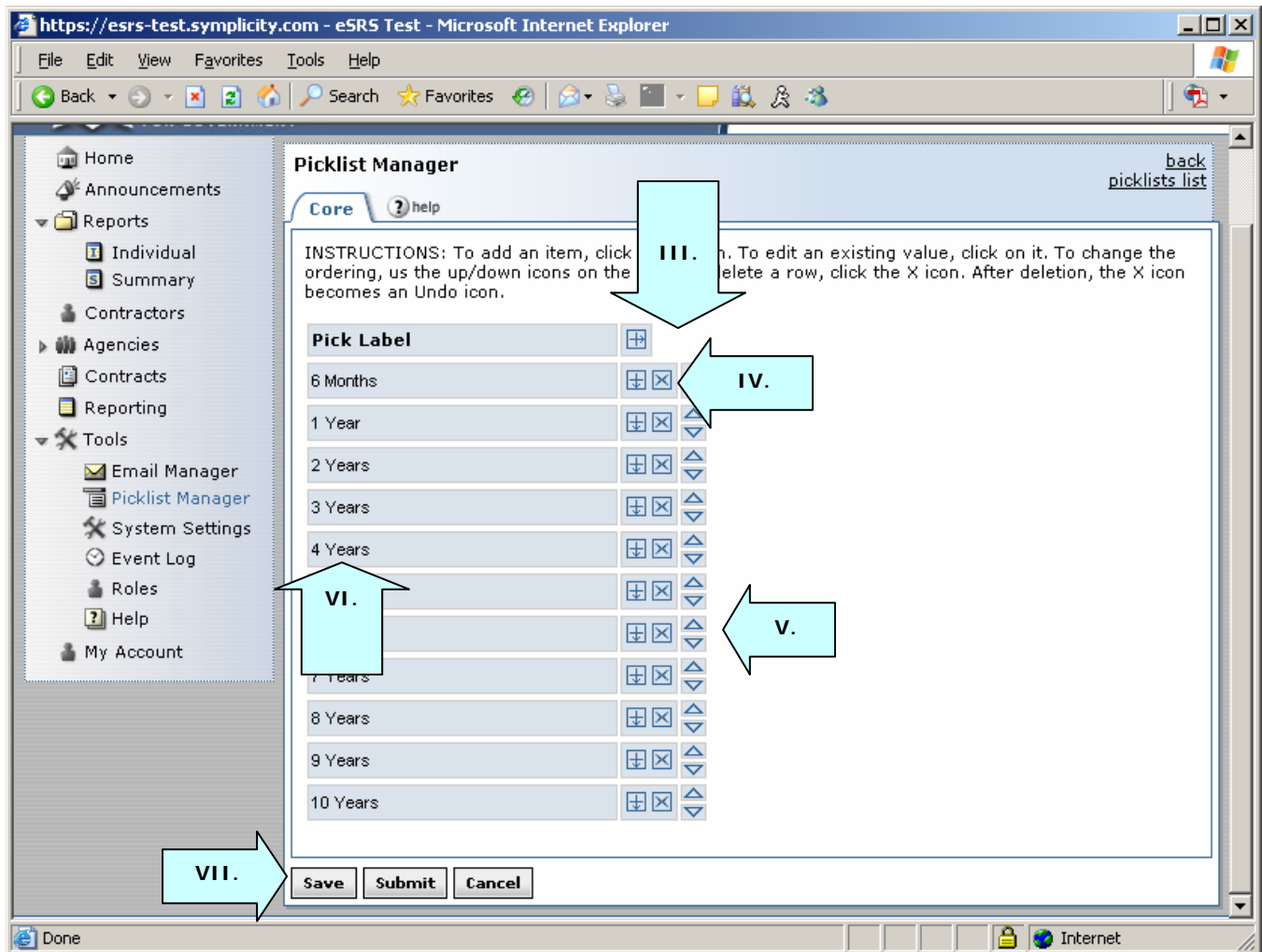
10.3 System Settings

System Settings change system wide parameters that can change the default behavior of the ESRS system and can only be performed as Super users.

I. Under Tools, Click on System Settings.
II. After modifying the desired fields, click "Save Selections".

System Message Screen

10.4 Event Log

The Event Log is a repository of all system transactions. System administrators may search the event log to review Logins, objects created, and objects modified. For each event, system administrators may view comprehensive details such as Session ID, Remote IP, etc.

- I.   View a list of events by clicking on the TOOLS section and then clicking the EVENT LOG sub-section on the left navigation menu.
- II. Refine the list of ESRS actions to a specific timeframe by utilizing on the date range filter.
- III. Search for a particular event by using keyword filter, user filter (by username), by database ID.
- IV. View comprehensive event details (Internet Protocol, User Agent, etc.) by clicking on a link in the Date column.

Event Log Screen

10.5 Roles

    I. Click on Tools, and then Roles on the left hand navigation menu.
   II. View Roles and designated rights by clicking on magnifying glass.
  III. Click on Edit icon 📝 to edit the roles.
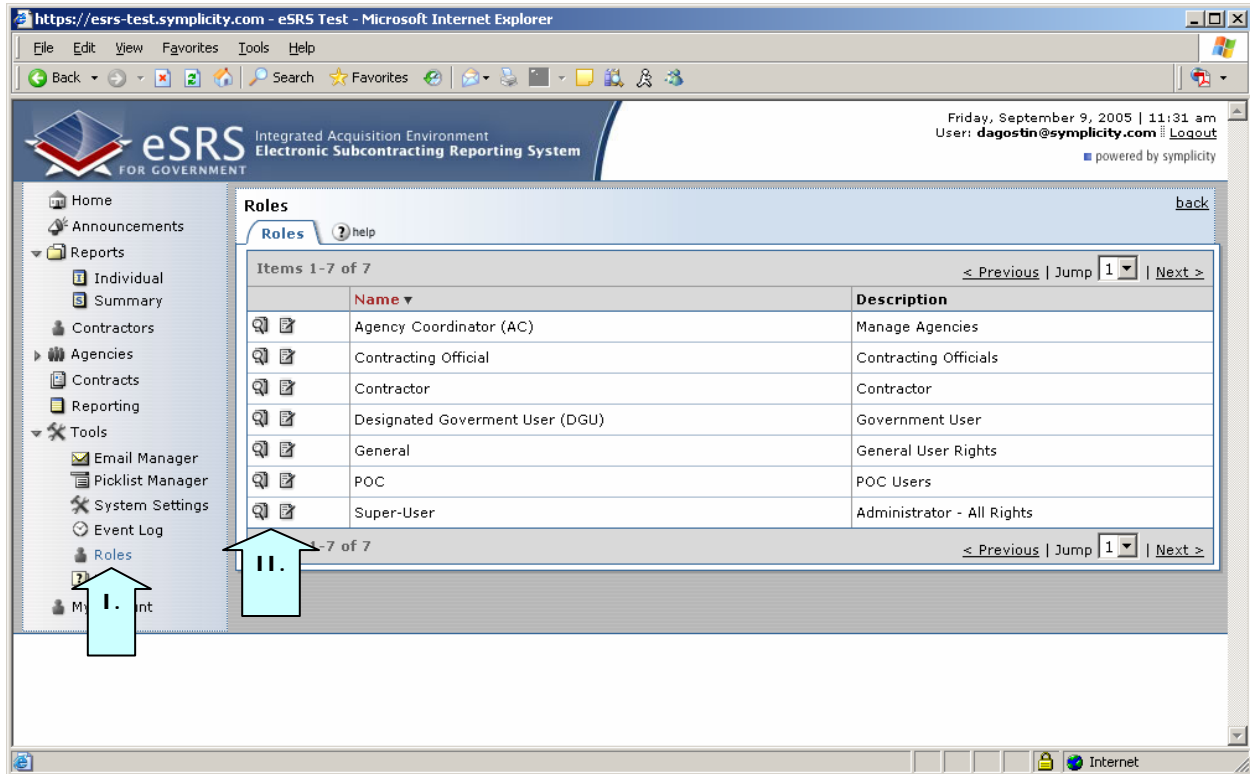
10.4 Help

It is possible to change the contents of the help sections that appear on the left hand side of the screen when a user clicks on the "Help Bubble".

    I.   Under Tools, Click on Help.
   II.   Select the interface for which you would like to add, edit, or delete a help option.
  III.   To add a new help item, click "Add New". (Continued on Next Page)

Help Contents Screen

    IV.   Type the Question.

    V.   Enter the Answer.

    VI.   Select the Section that the help contents will appear.

    VII.   Save your entry by clicking Submit.

Add New Help Contents

11. My Account

11.1 General Information

My Account enables users to change their personal information (Name, Title, Phone, Fax, E-mail) and passwords.

    I.   Under Tools, Click on My Account.
   II.   Change the fields that you wish to edit.
 III.   Click on "Save".

11.1 Change Password

    I.   Under Tools, Click on My Account.
   II.   Click on the password tab.
 III.   Enter your new password.
 IV.   Click on "Save".

Password Change Screen